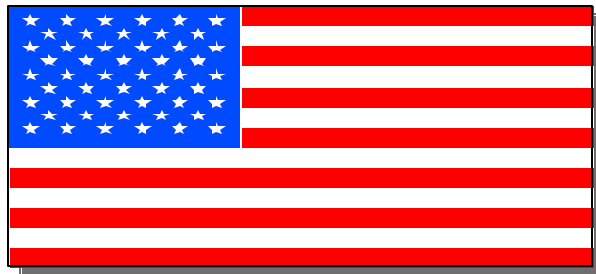


The U.S. Almond Industry Situation

Horticultural & Tropical Products Division
Foreign Agricultural Service



Updated March 2002

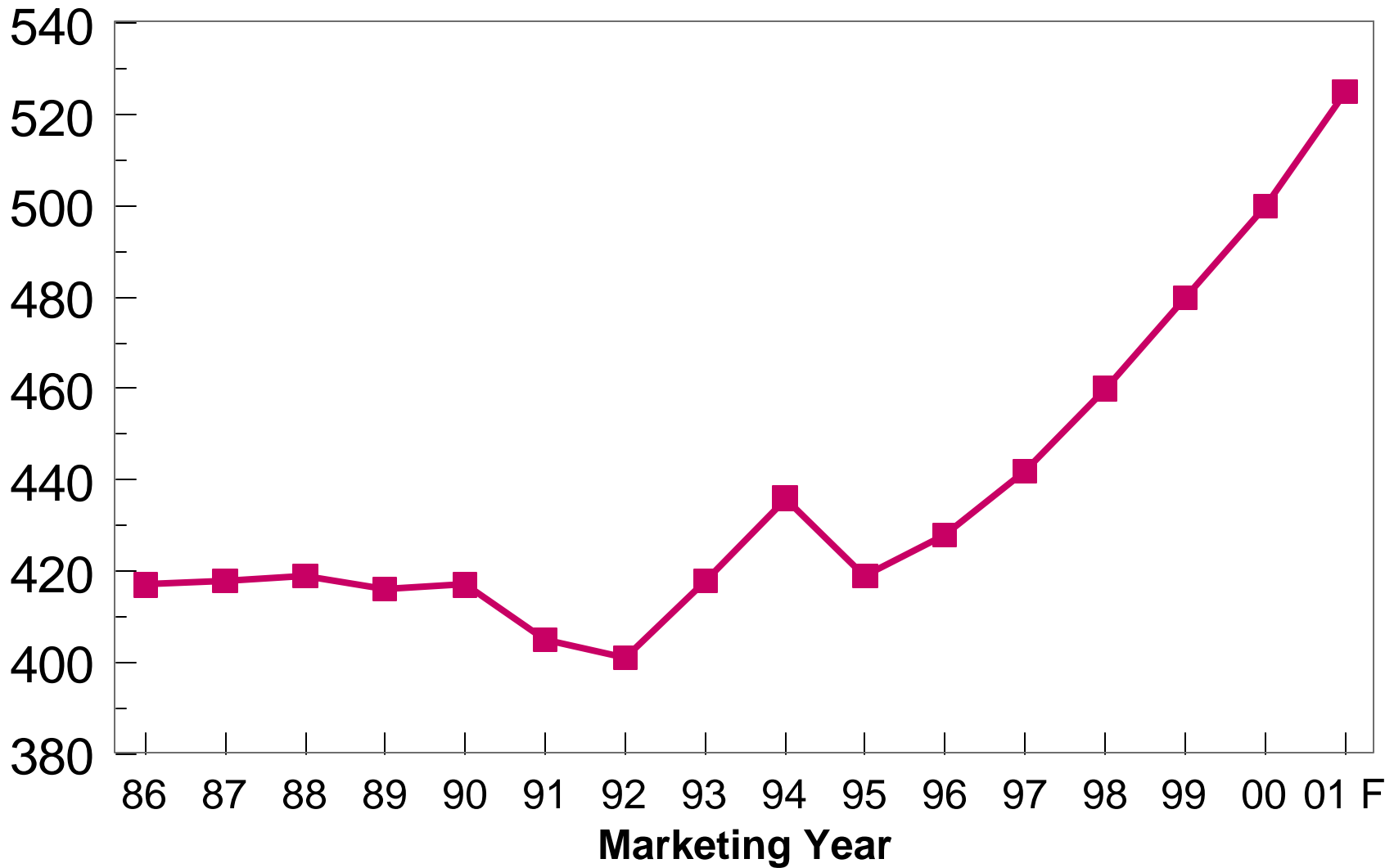
U.S. Almond Industry Facts

- By value, almonds are the number one horticultural export commodity (\$686 million in Calendar Year 2001).
- California is the only state that commercially produces almonds.
- There are approximately 6,000 almond growers in the United States.
- Over 40% of tree nuts in the U.S. are eaten in cereals and desserts.
- California produces roughly 75% of the world almond supply.
- Marketing Year 2000/01* crop is expected to reach 304,129 metric tons.
- The 2001/02 crop is forecast at 370,135 metric tons, a 22% increase from the previous year.
- Almond bearing acreage for Marketing Year 2001/02 is estimated at 525,000 acres.

* - Marketing Year for almonds is August-July

California Almond Acreage Has Expanded Rapidly

(000) Acres

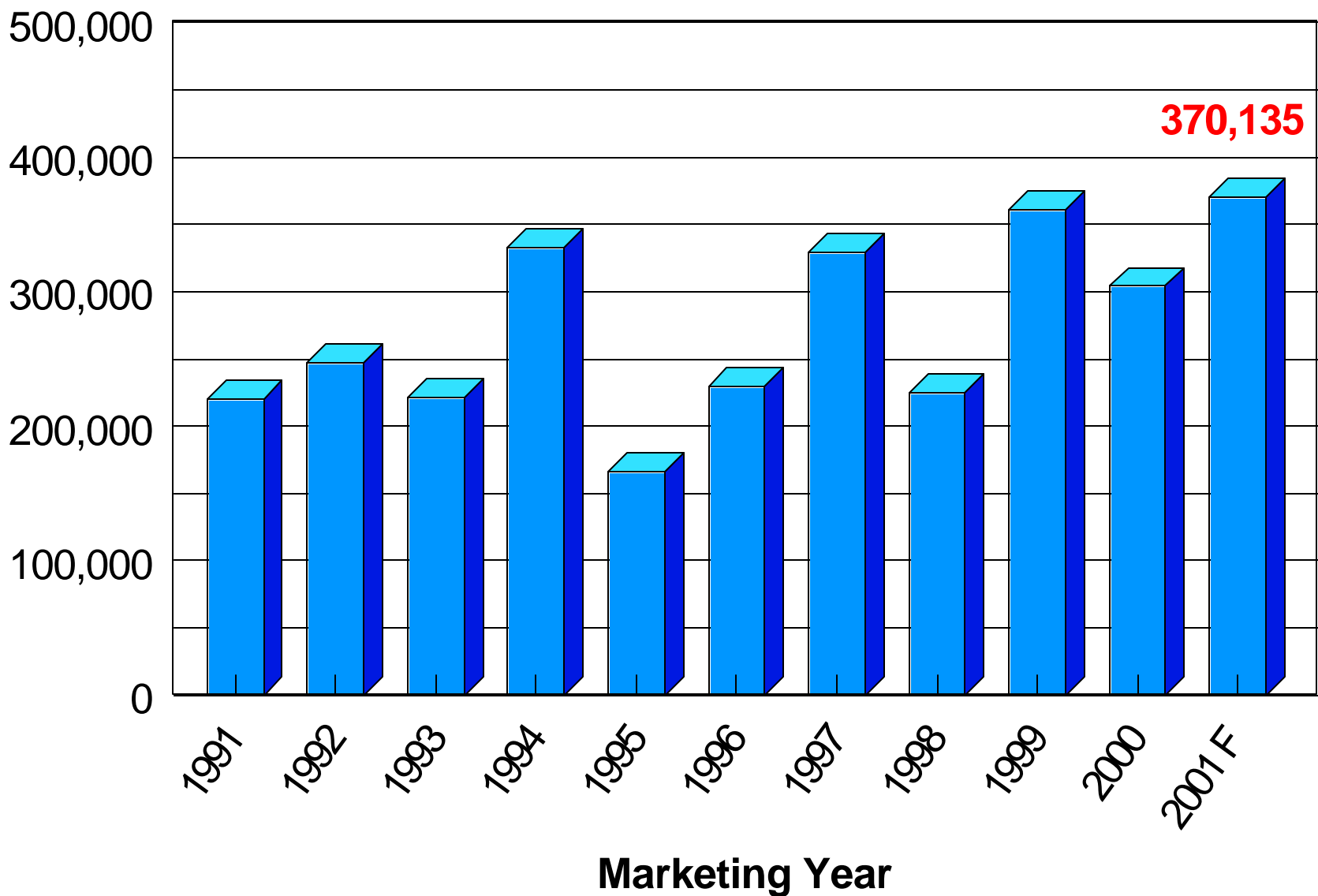


F - Forecast

Source: NASS

California Almond Production

Metric Tons

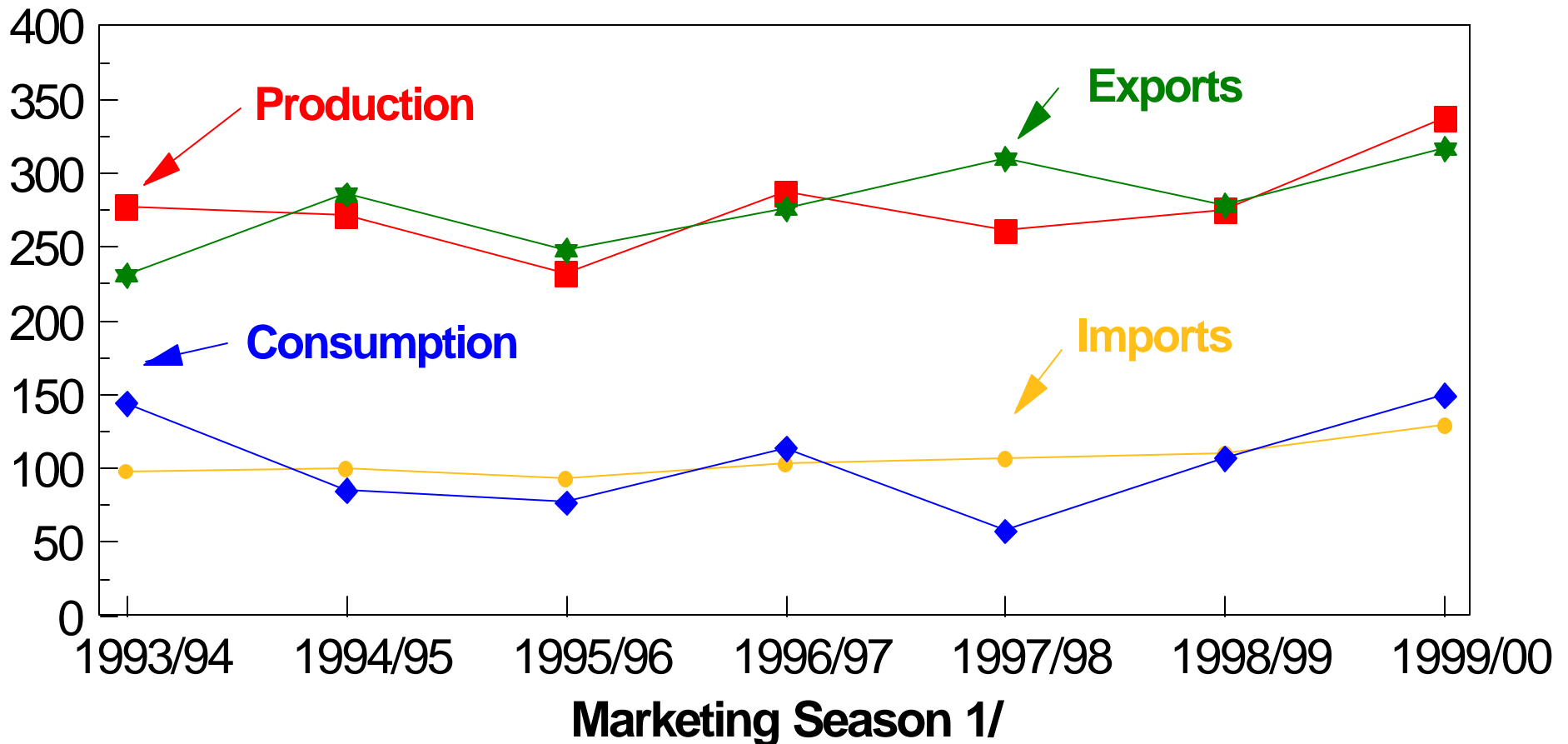


F - Forecast

Source: California Agricultural Statistics Service

The U.S. Tree Nut Market

Thousand Metric Tons

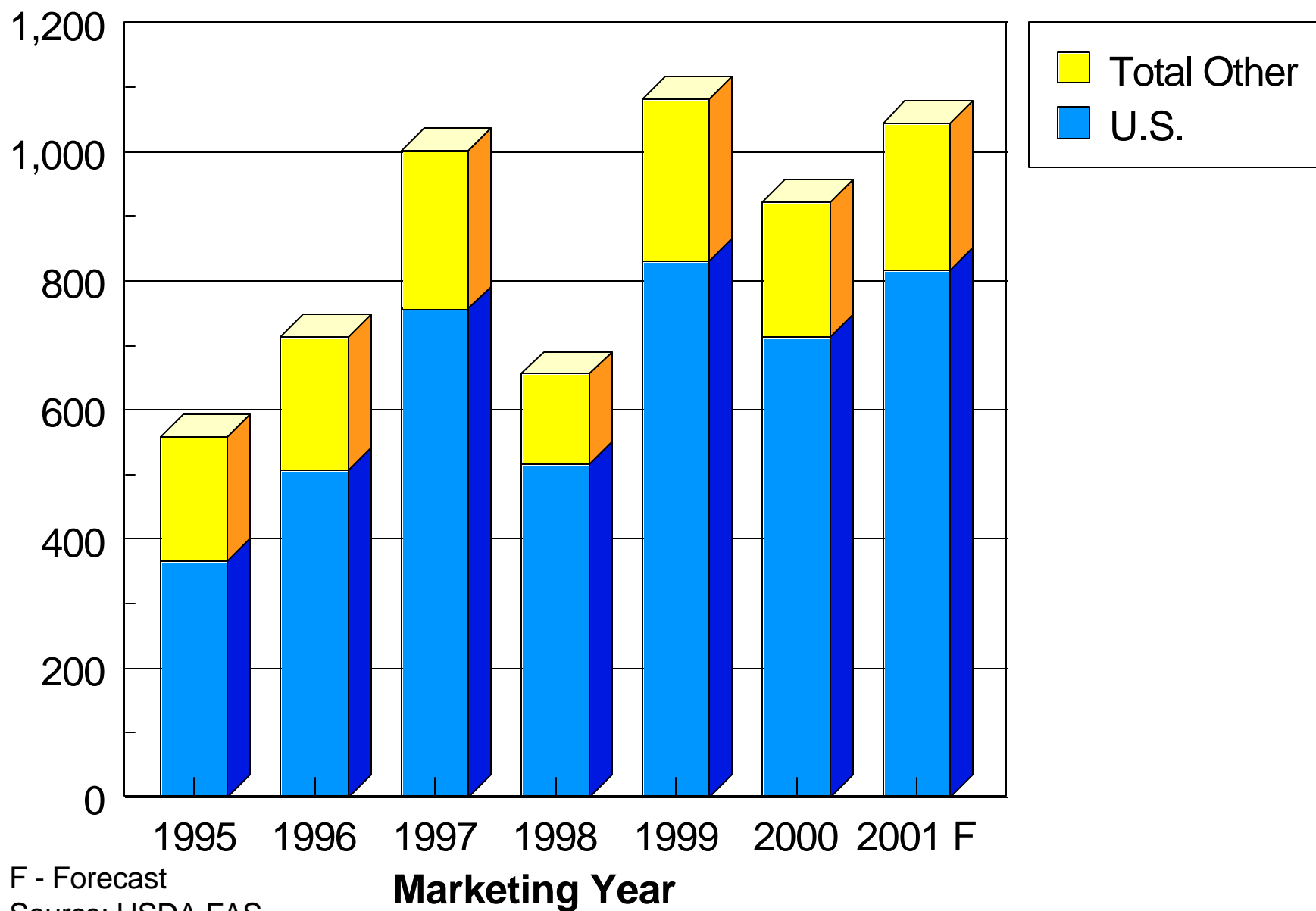


Source: Economic Research Service, USDA

1/ Beginning July 1 for almonds, hazelnuts, macadamia, and peacans; August 1 for walnuts; September 1 for pistachios

U.S. Share of World Almond Production

Million Pounds



Commercial Production of Almonds in Major Producing Countries

Million Pounds

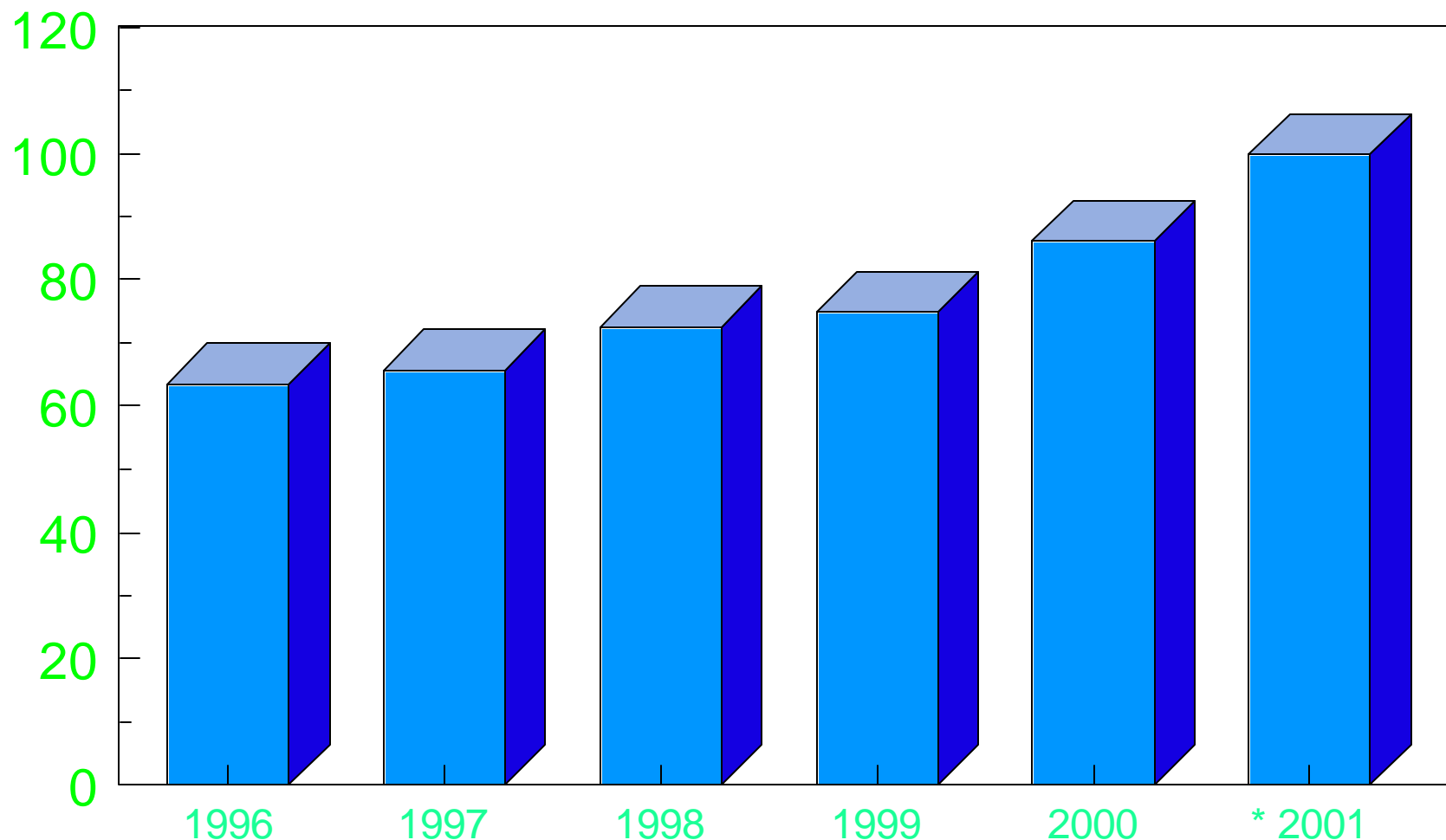
Marketing Year	Greece	Italy	Spain	Turkey	U.S.A.	Total	U.S.A. % of Total
1992/93	35.30	39.70	158.70	34.60	545.90	814.20	67%
1993/94	44.10	33.10	185.20	35.30	488.20	785.80	62%
1994/95	35.30	30.90	154.90	34.60	732.90	988.50	74%
1995/96	28.70	33.10	99.90	30.20	366.10	557.90	66%
1996/97	28.20	13.20	132.30	31.50	507.50	712.80	71%
1997/98	32.00	24.30	165.30	24.30	756.50	1,002.30	75%
1998/99	26.50	19.80	66.10	26.50	517.00	655.90	79%
1999/00	37.80	37.80	146.70	31.10	803.00	1,056.40	76%
2000/01	34.40	22.20	117.80	34.40	674.90	883.70	76%
2001/02	38.20	44.40	131.10	33.30	822.50	1,069.50	77%

Source: USDA/FAS, *World Hort. Trade & Export Opportunities*

Note: Reporting countries account for nearly 100% of world production.

California Domestic Almond Shipments to Set a New Record in 2001

(000) Metric Tons

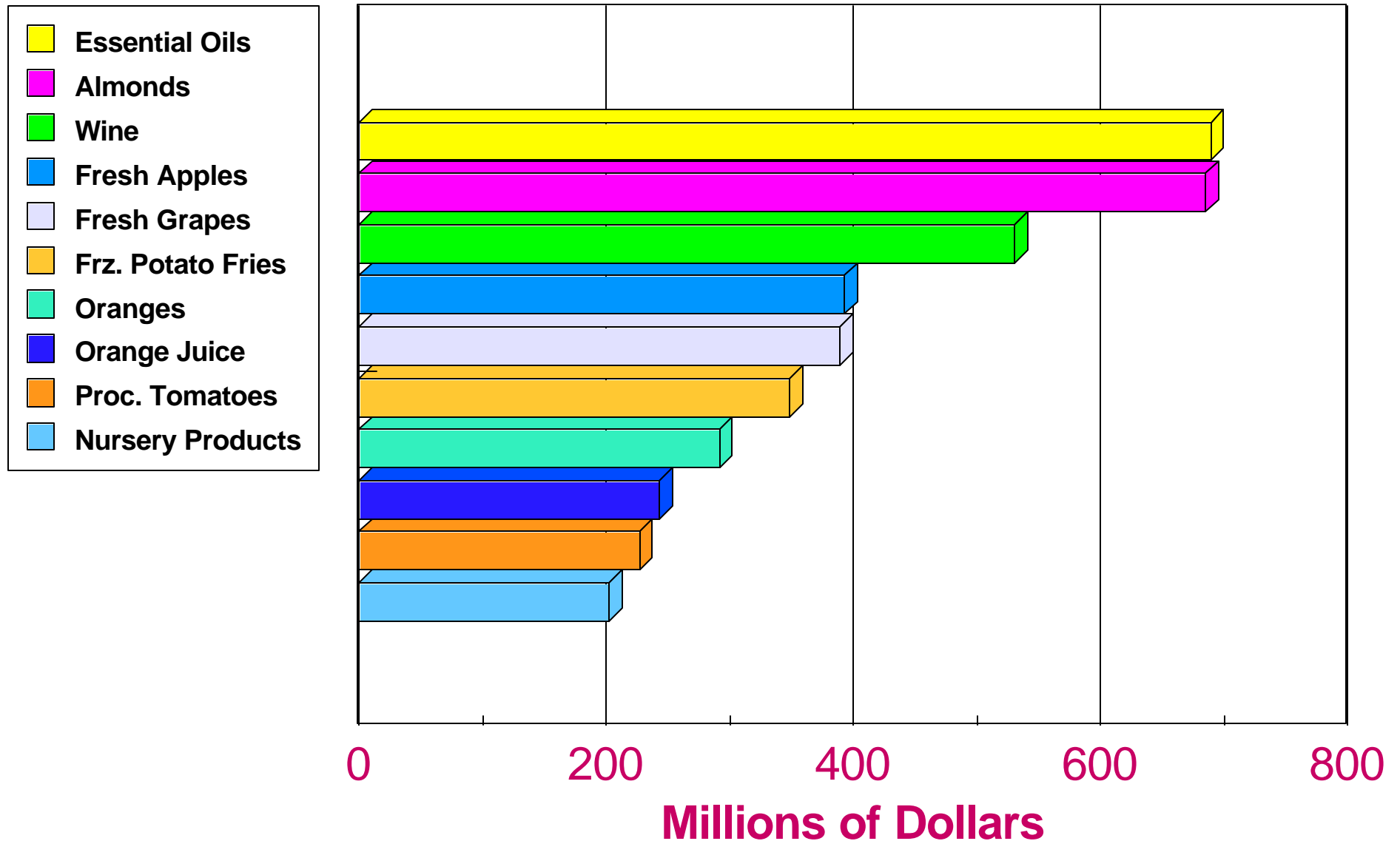


* - Forecast

Marketing Years 1996-2001

Source: Almond Board of California

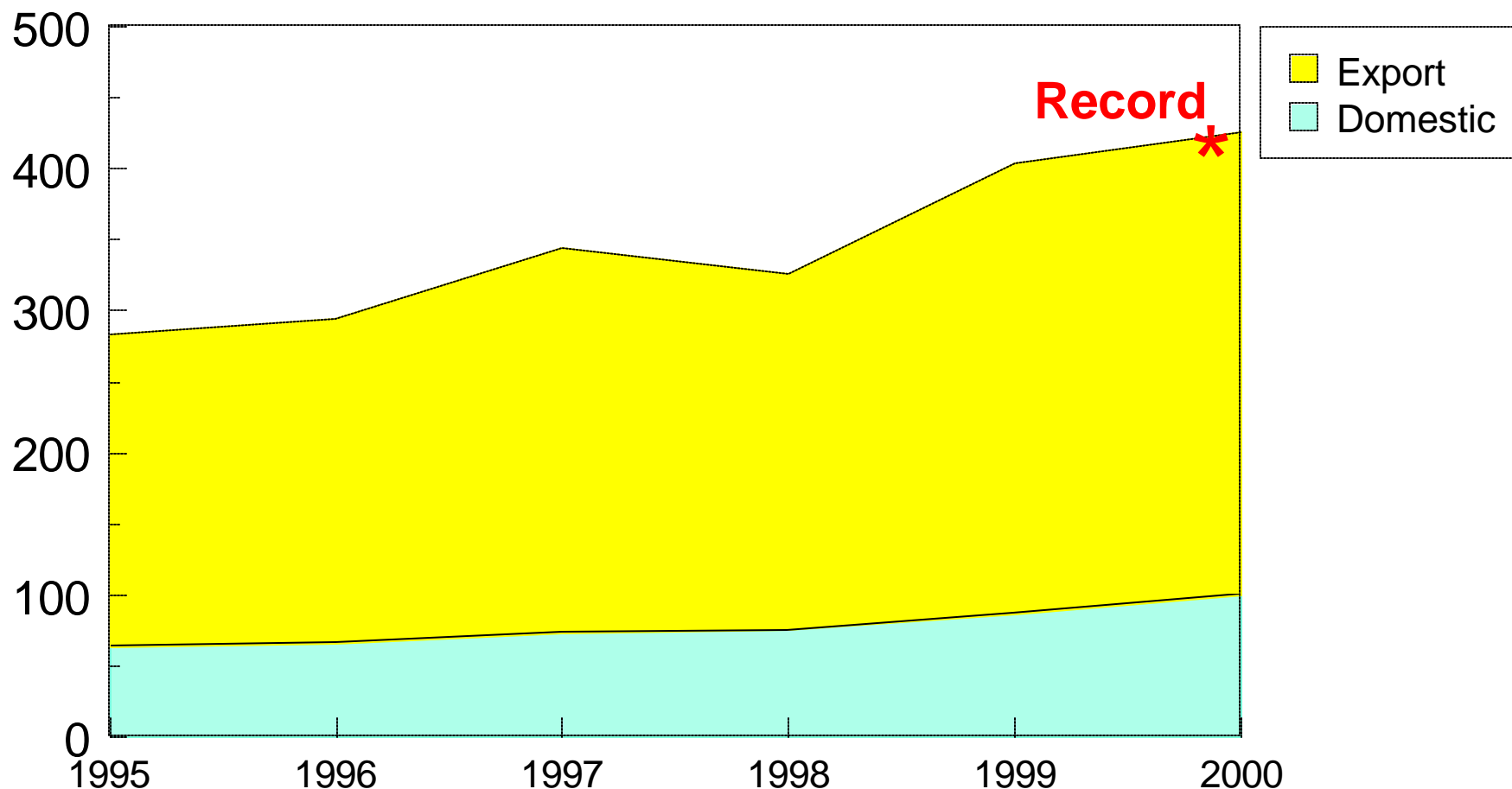
Almonds are the Second Top U.S. Hort Export by Value



Source: U.S. Census Bureau
Calendar Year 2001

Almond Export Shipments are Increasing Both in Absolute and Relative Terms

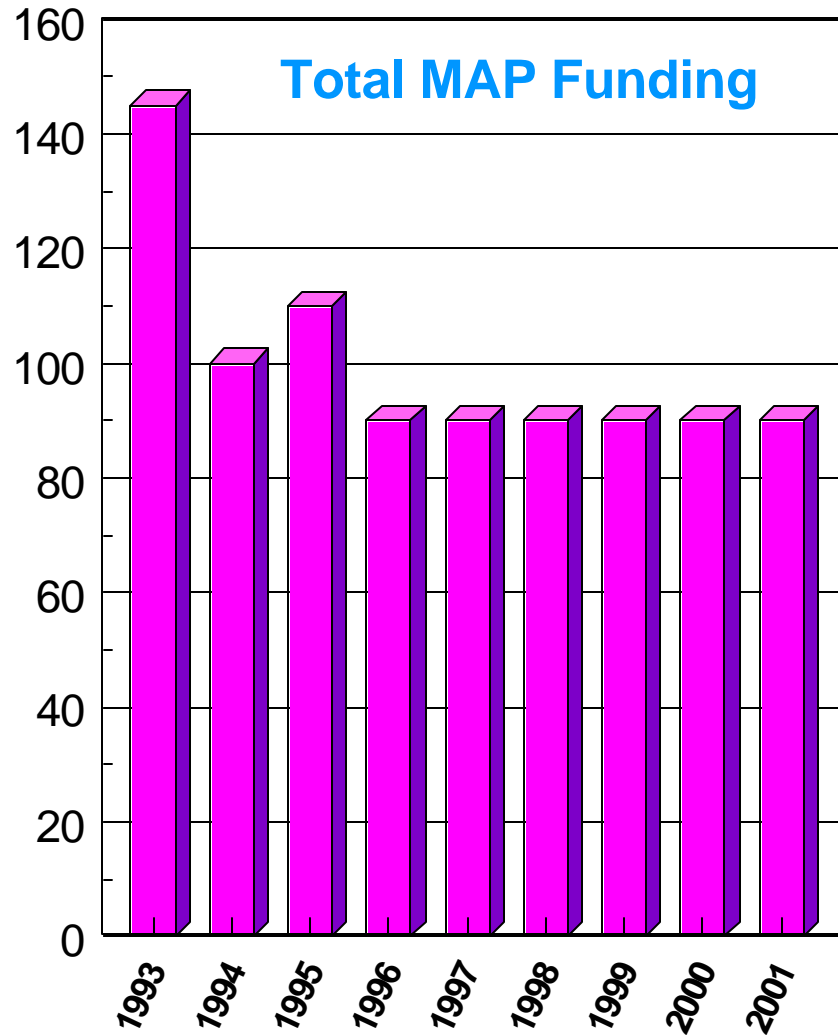
(000) Metric Tons



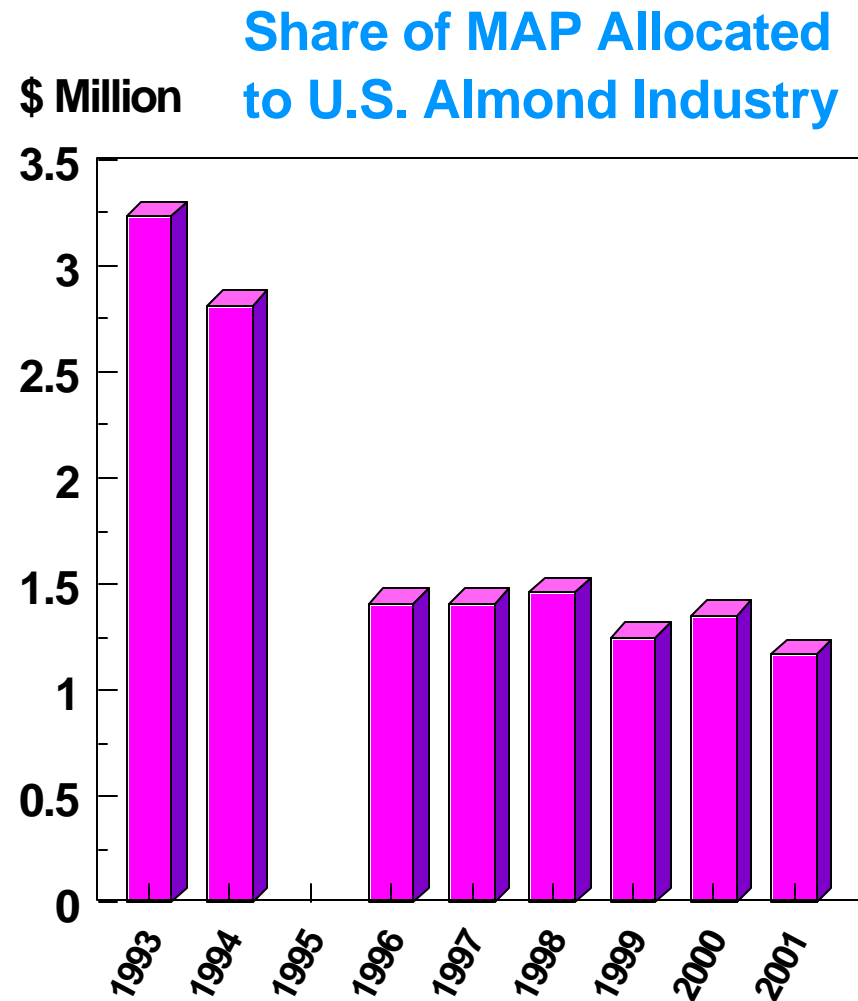
Source: Almond Board of California
Marketing Years 1995-2000

Market Access Program (MAP) Funds Have Been Important to U.S. Almond Promotional Efforts

\$ Million

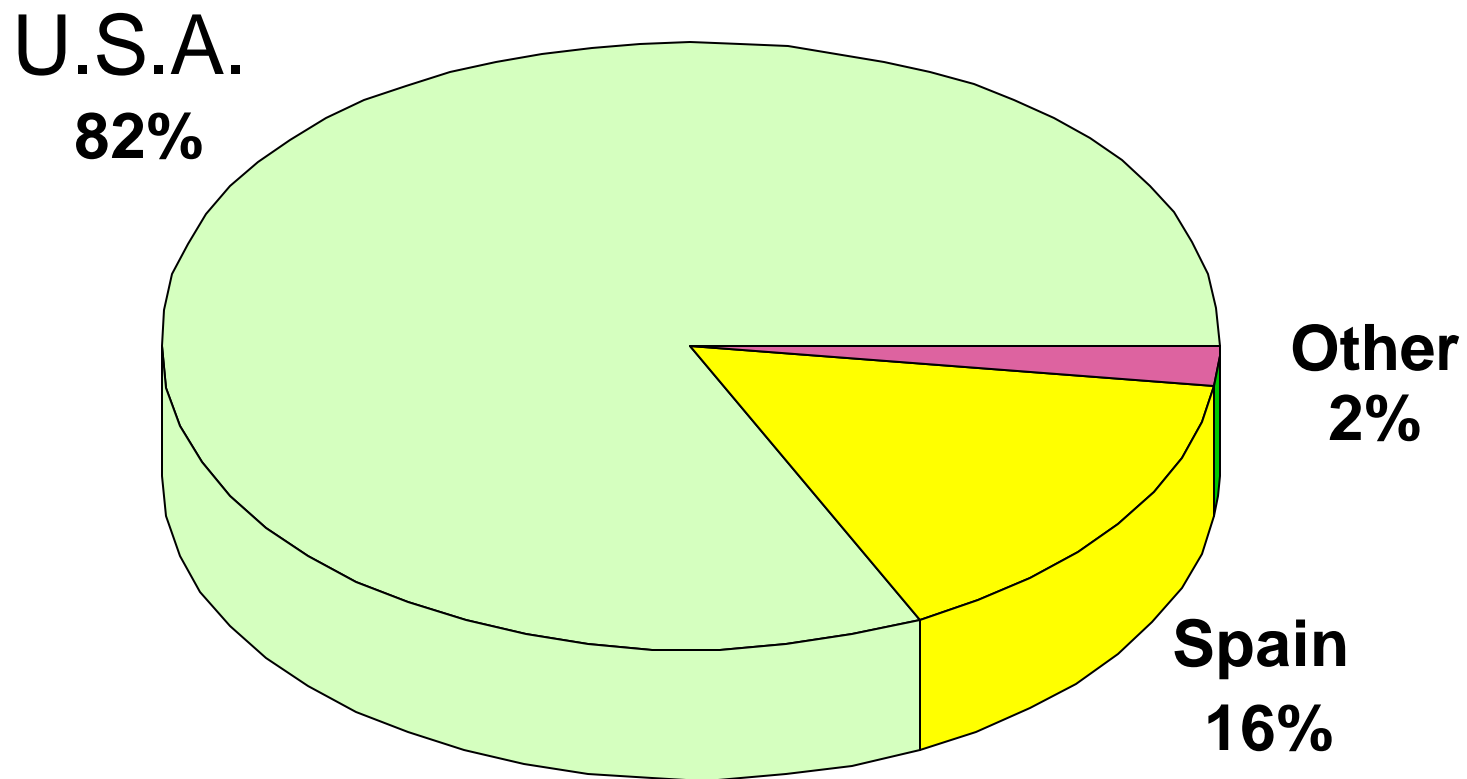


\$ Million



Fiscal Years

The U.S. is, by far, the largest exporter of almonds in the world. Spain comes in a distant second.

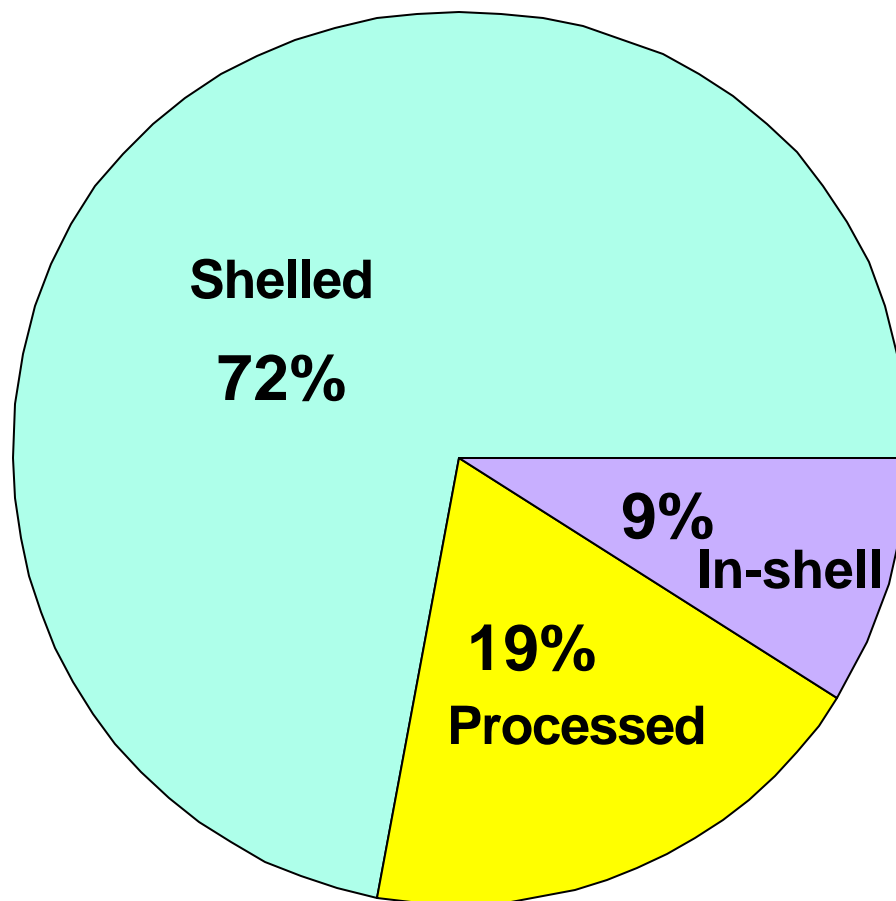


Marketing Year 2001/02

Source: USDA, FAS World Horticultural & U.S. Exports Opportunities

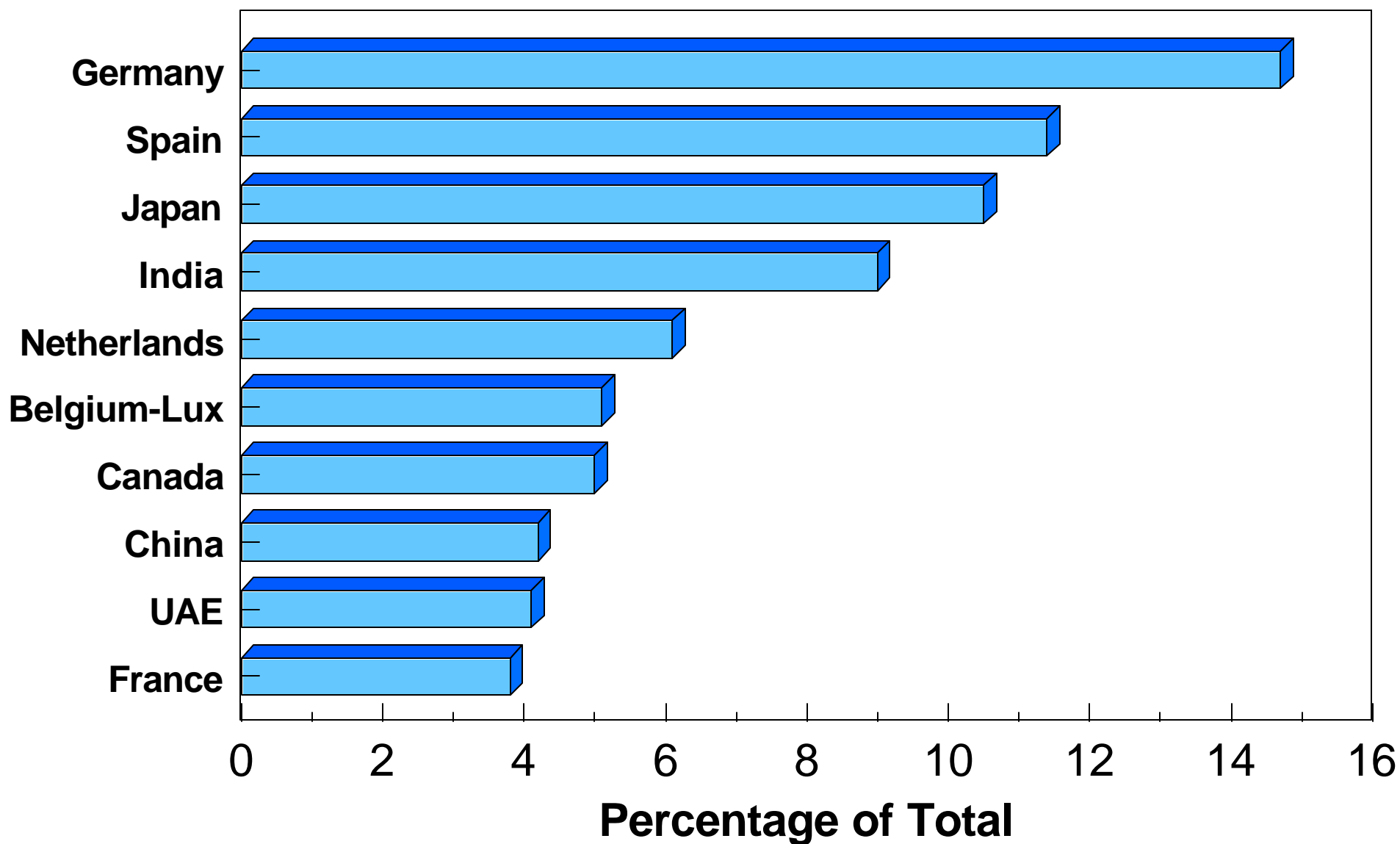
Almond Export Shipments by Product Type

Marketing Year 2001



Source: Almond Board of California

Top 10 Almond Export Destinations (By Value)



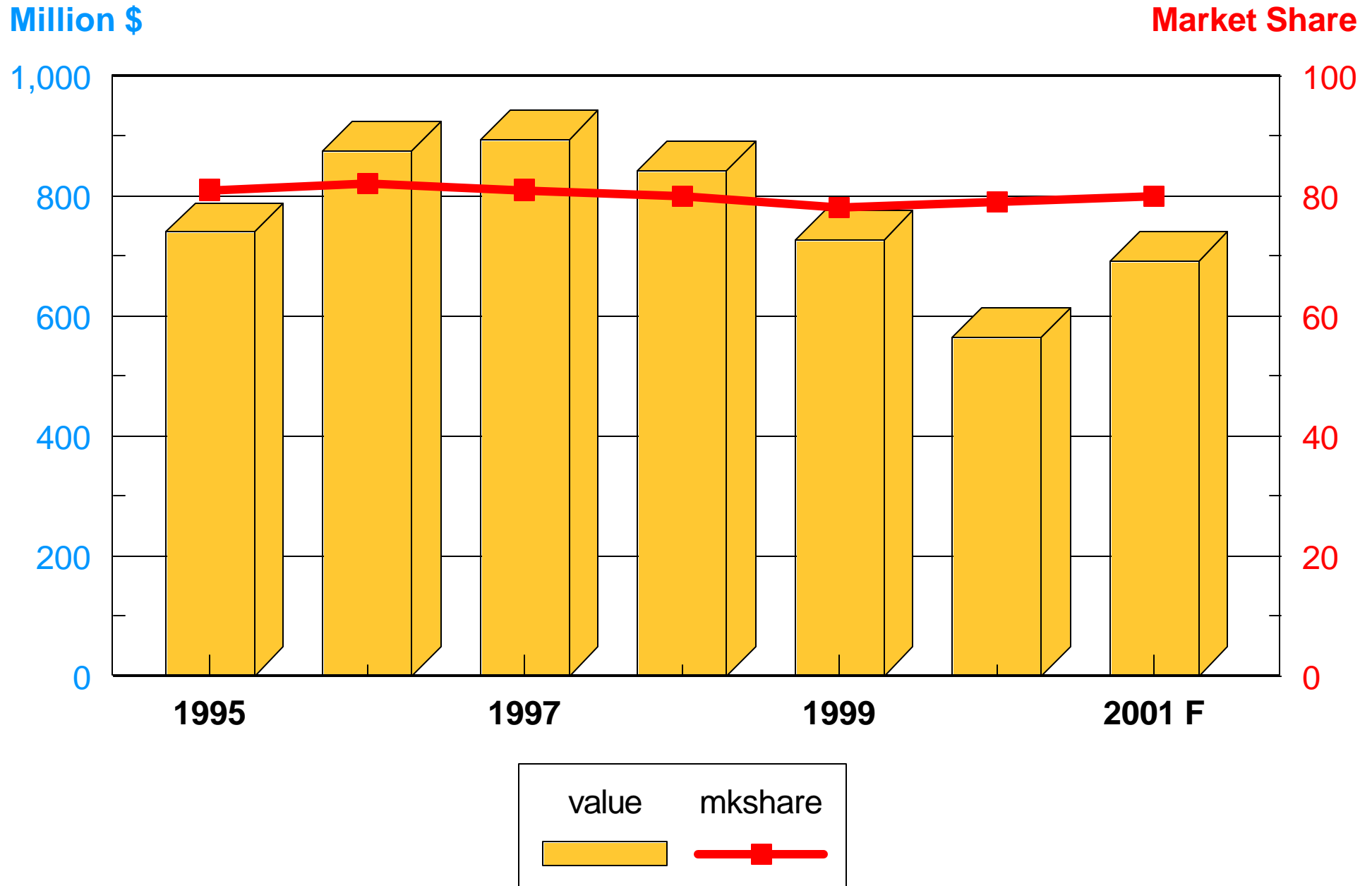
Source: U.S. Census Bureau
Calendar Year 2001

2001 Applied Tariff Rates of Almonds for Selected Countries

Commodity	Almonds (ns)	Almonds (sh)
HS #	080211	080212
EU	5.6%	3.5%
India	Rs 35 per kg	Rs 65 per kg
Japan	2.4%	2.4%
Hong Kong	0%	0%
China	29% + 13 or 17 VAT	6% + 13 or 17 VAT
Canada	0%	0%
Turkey	44.6%	44.6%
Taiwan	10%	10%
Korea	8%	8%
Israel	Out-of-Quota Tariff 90%	Out-of-Quota Tariff 90%
U.S.A.	2%	5.7%

U.S. Almond Exports to the World

Value and Market Share



Marketing Year 1995-2001

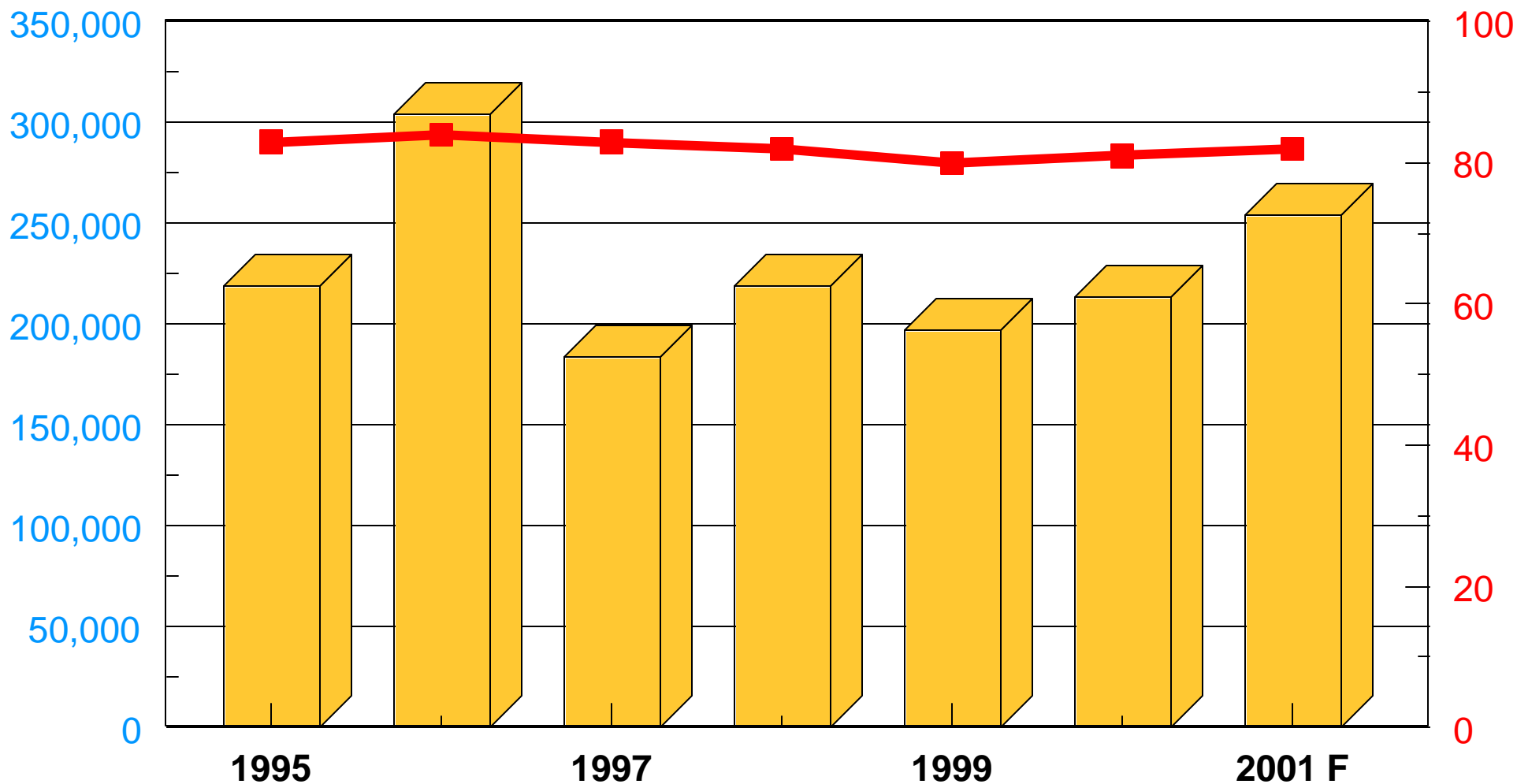
Source: U.S. Agricultural Attache Reports

U.S. Almond Exports to the World

Quantity and Market Share

Metric Tons

Market Share



qty

mkshare



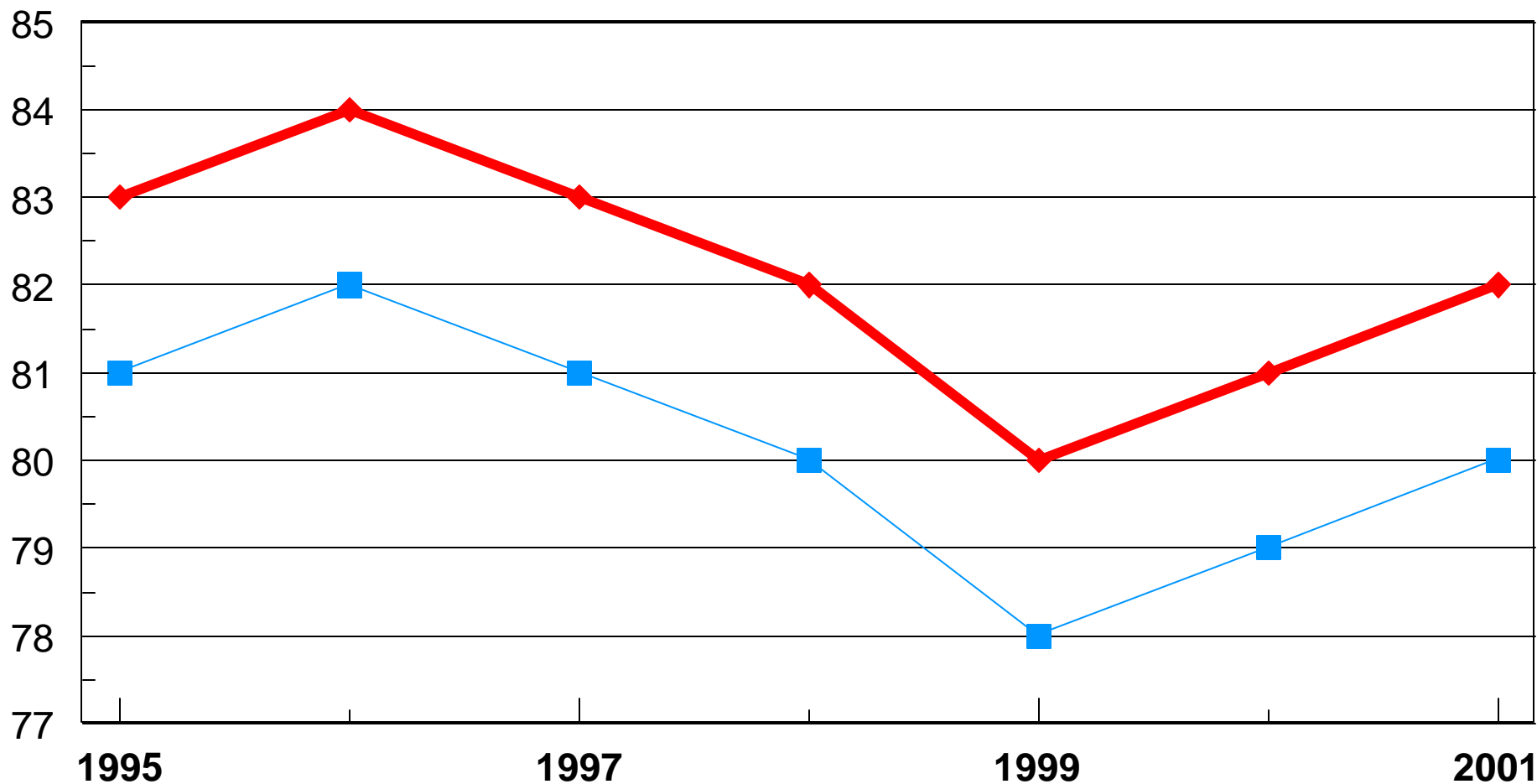
Marketing Year 1997-2001

Source: U.S. Agricultural Attache Reports

U.S. Almond Exports to the World

Value Market Share and Quantity Market Share

Market Share



Market Share Value Market Share Quantity



Marketing Year 1986-1999

Source: U.S. Agricultural Attache Reports

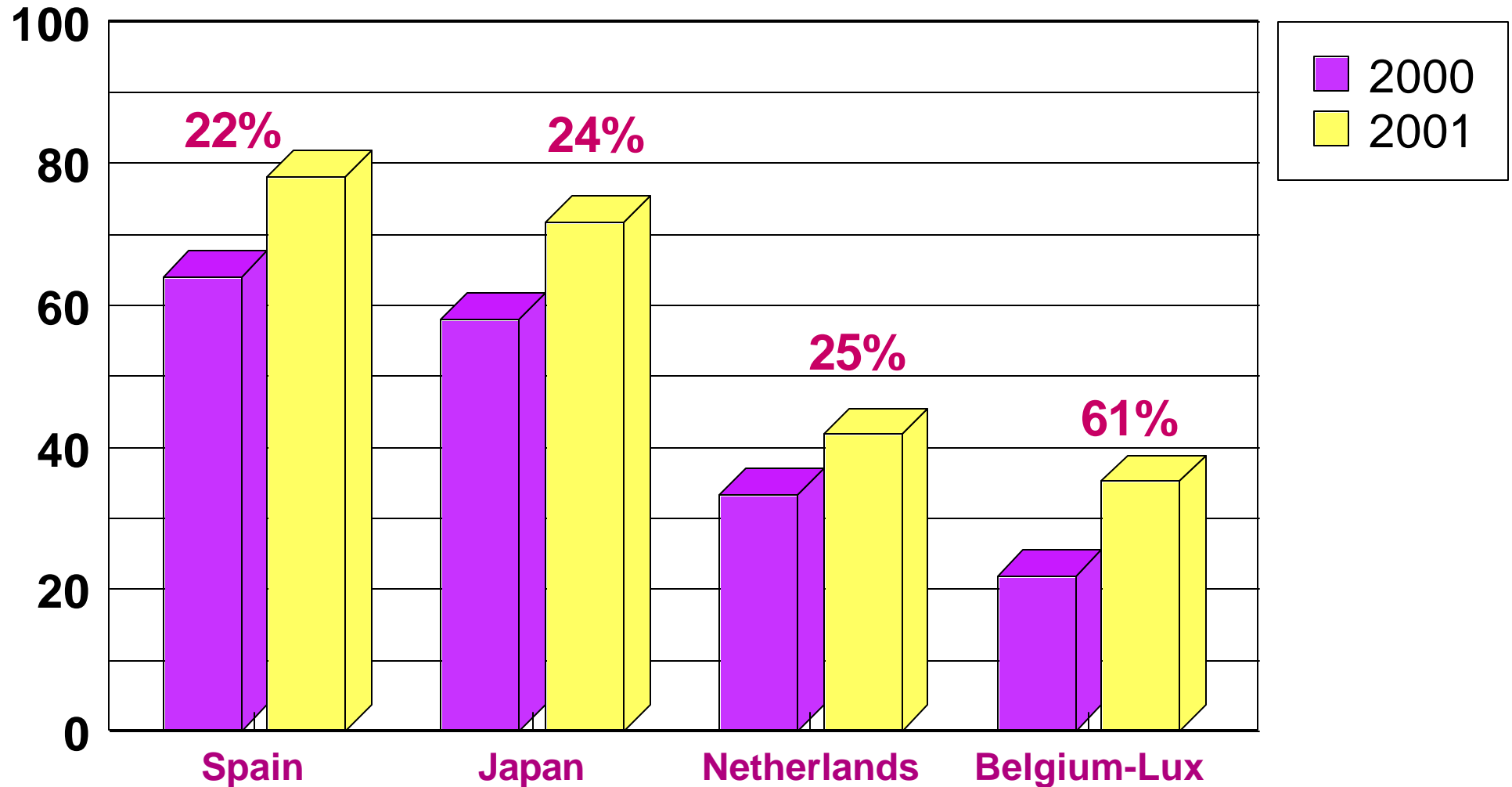
European Markets are Doing Well

Calendar Year 2001

- Exports to Spain have increased **22%** from the previous year.
- Belgium-Luxembourg has jumped from the 10th biggest export market to become the 6th largest export destination for almonds.
- Exports to Italy have increased **27%** from previous year.
- Exports of almonds to The Netherlands have jumped **25%** from last year totaling \$4.2 million.
- Denmark moved up two positions from the 17th biggest export market to become the 15th largest export destination for almonds.

Percent Growth in Almond Exports to Major World Markets

Millions of Dollars



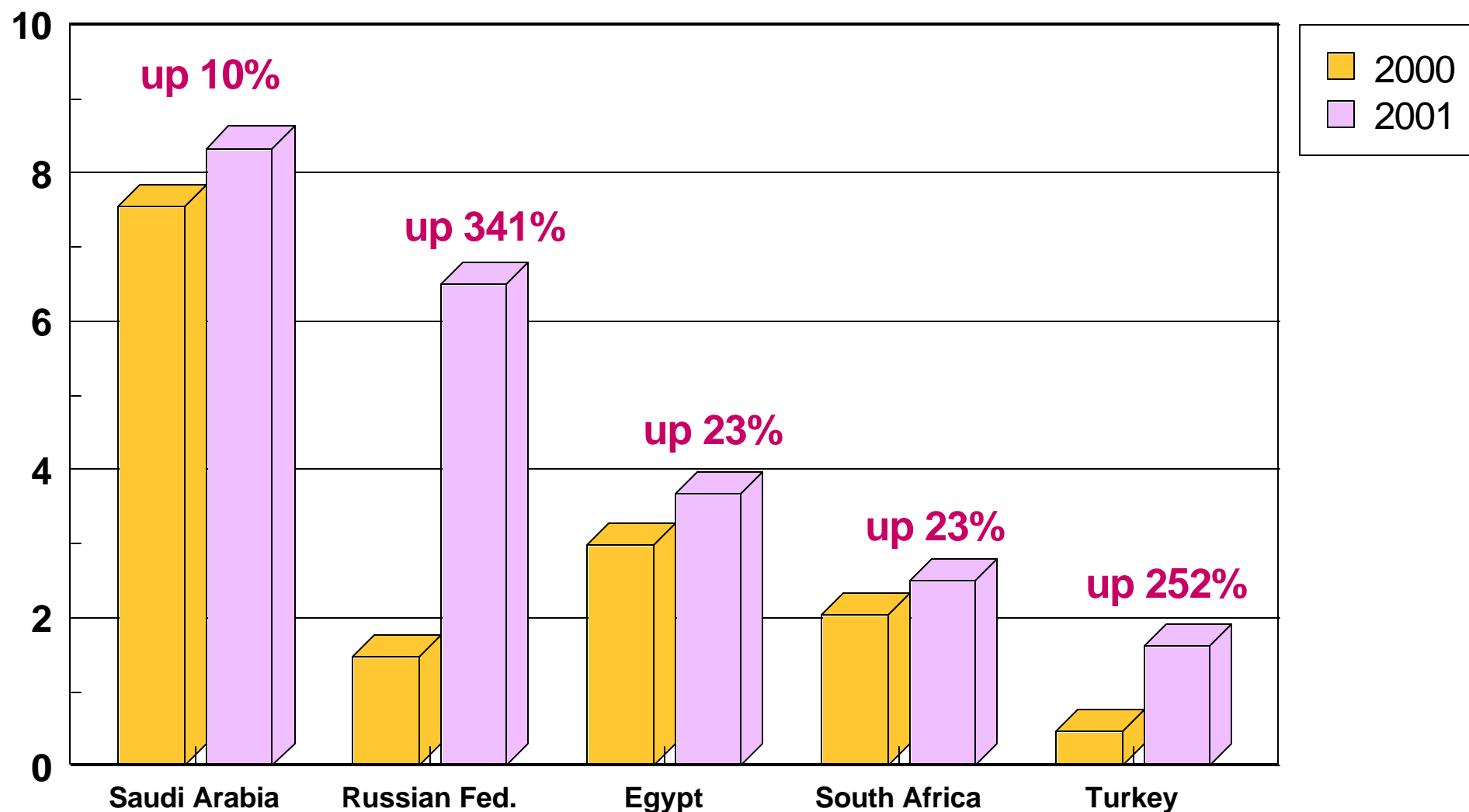
Calendar Year

Source: U.S. Department of Commerce

Keep an Eye on Future Growth Markets

(Almond Export Value Over \$1 million)

\$ Million



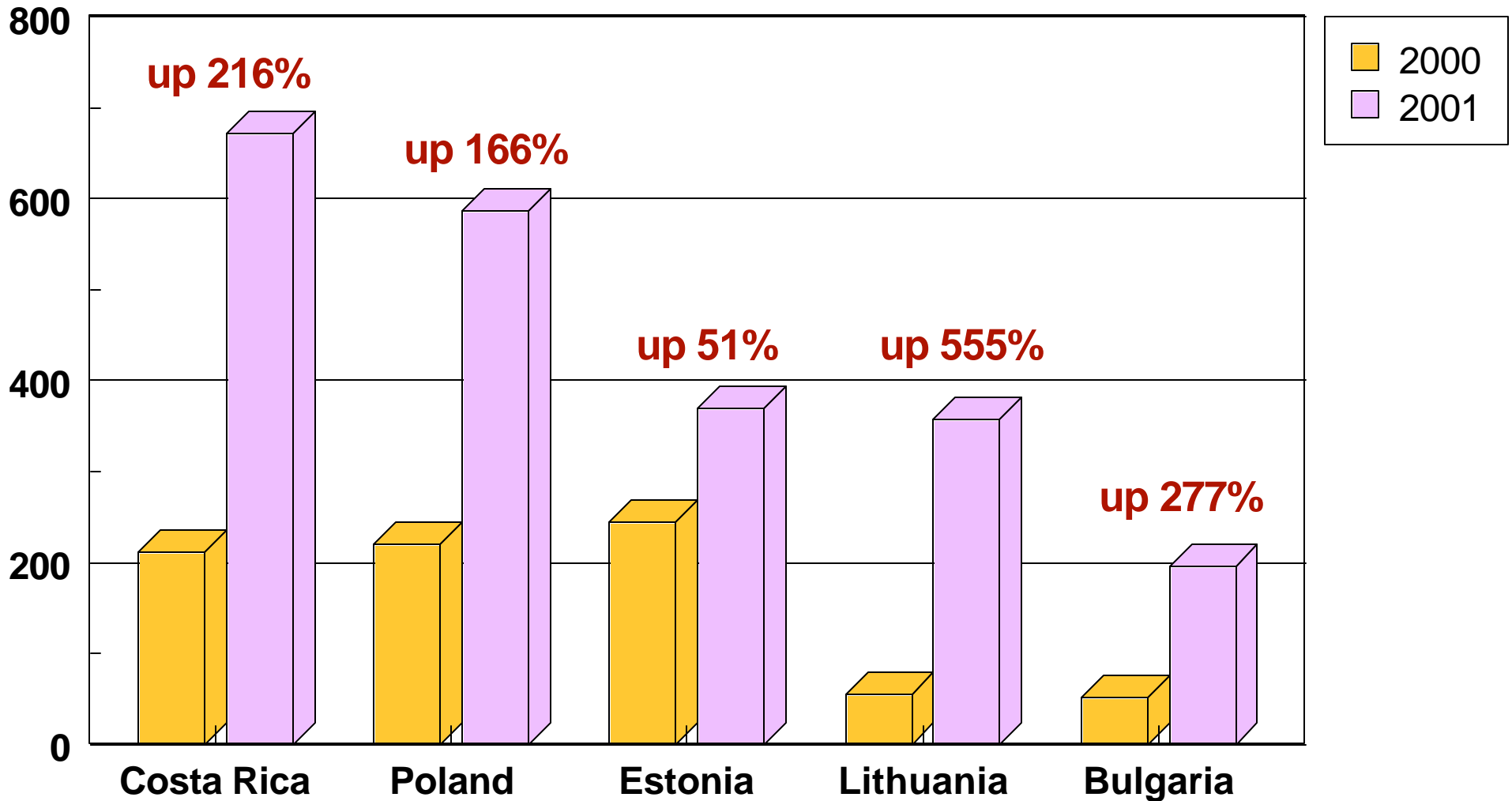
Calendar Year

Source: U.S. Department of Commerce

Keep an Eye on Future Growth Markets

(Almond Export Value *Under* \$1 million)

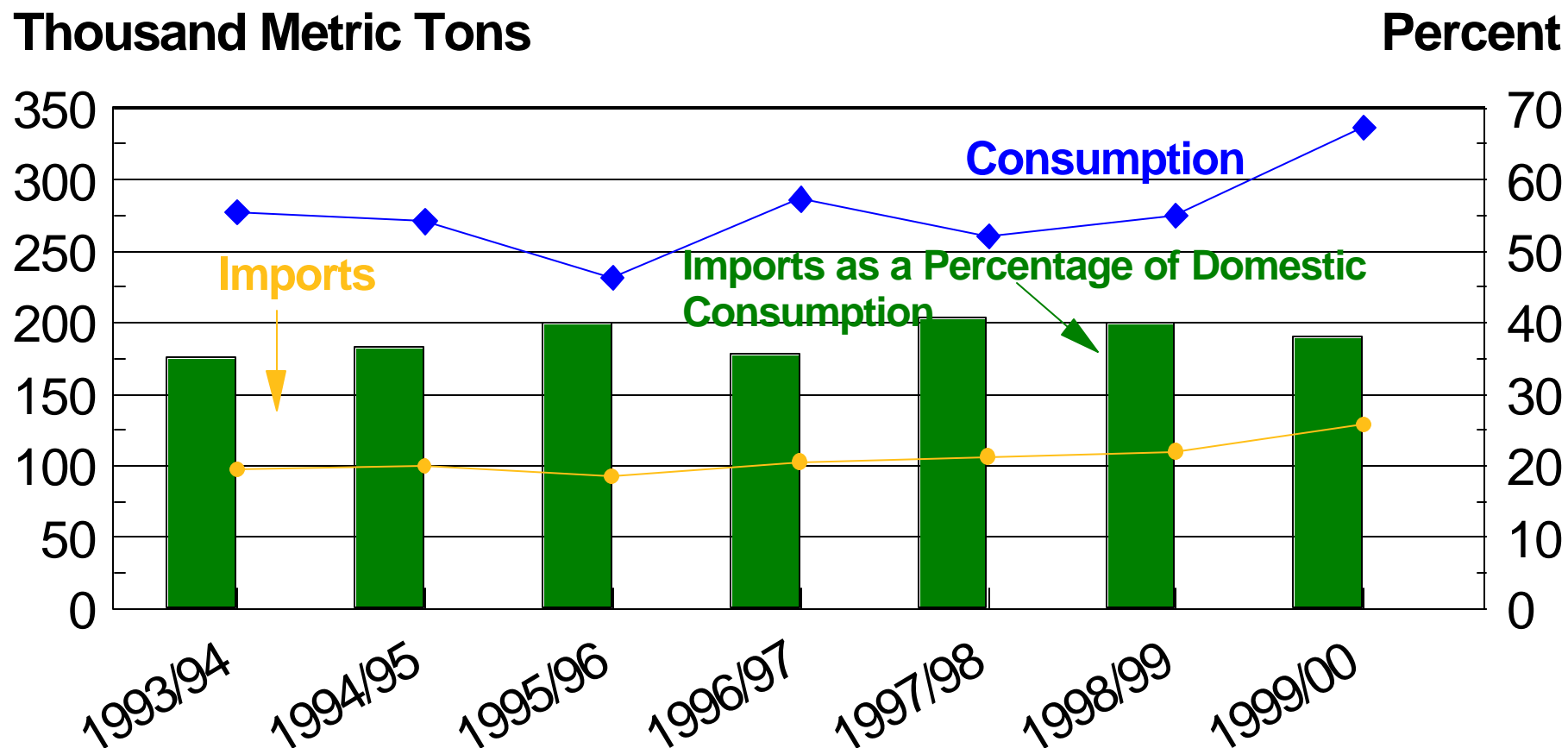
Thousand \$



Calendar Year

Source: U.S. Department of Commerce

U.S. Tree Nut Imports and Market Share of Domestic Consumption



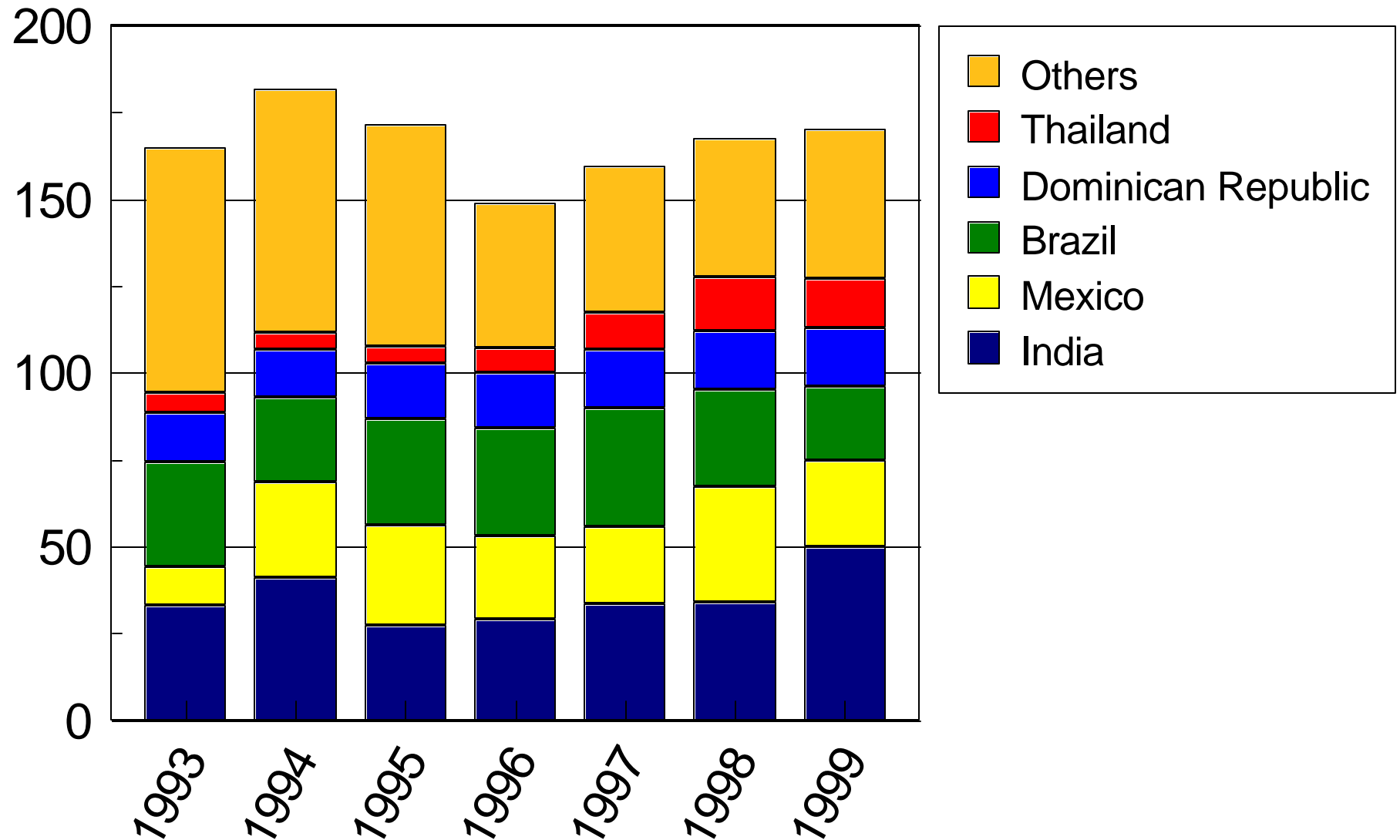
Marketing Season 1/

Source: Economic Research Service, USDA

1/ Beginning July 1 for almonds, hazelnuts, macadamia, and peacans; August 1 for walnuts; September 1 for pistachios

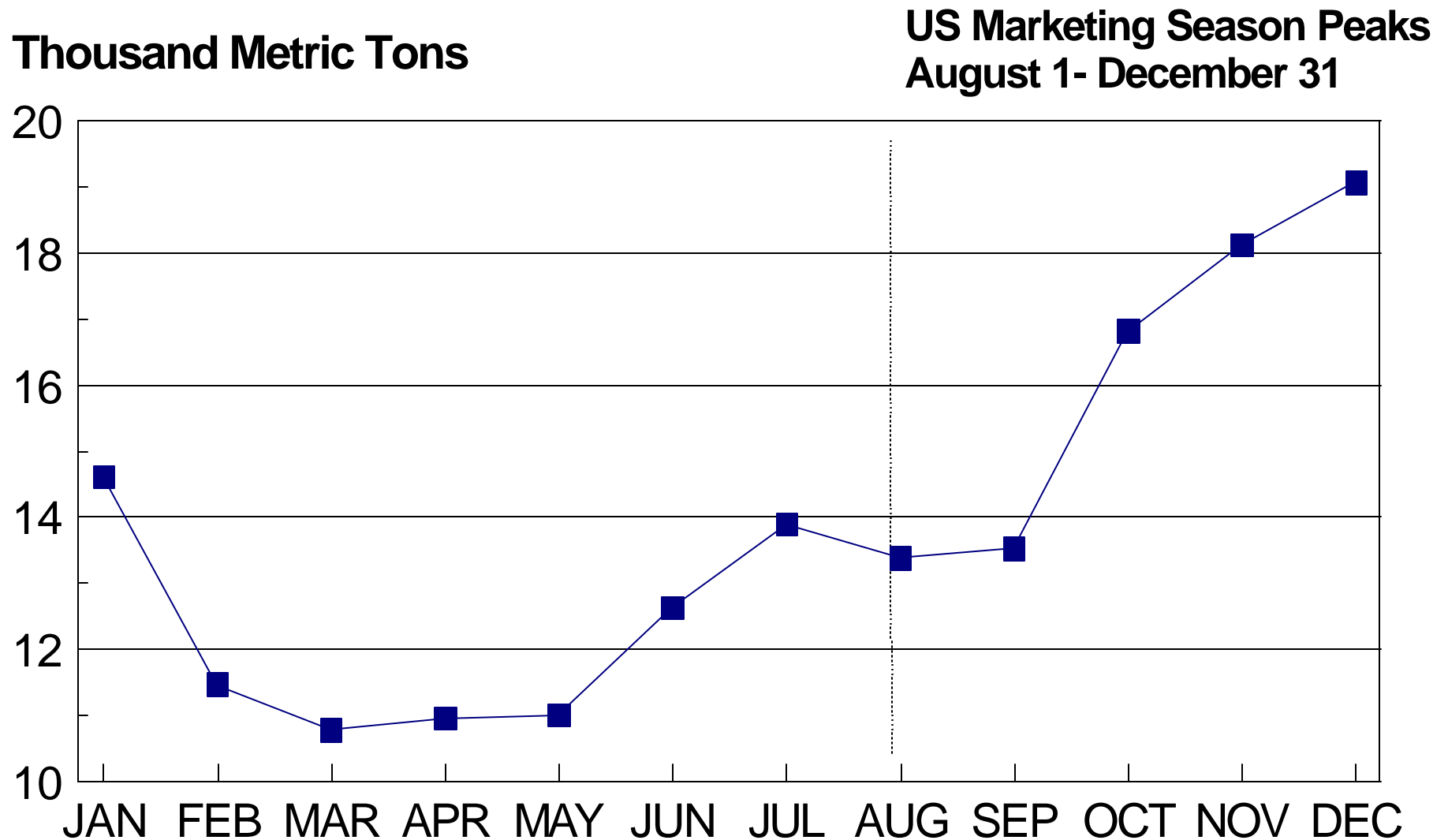
Origins of U.S. Imported Tree Nuts

Thousand Metric Tons



Source: US Bureau of the Census

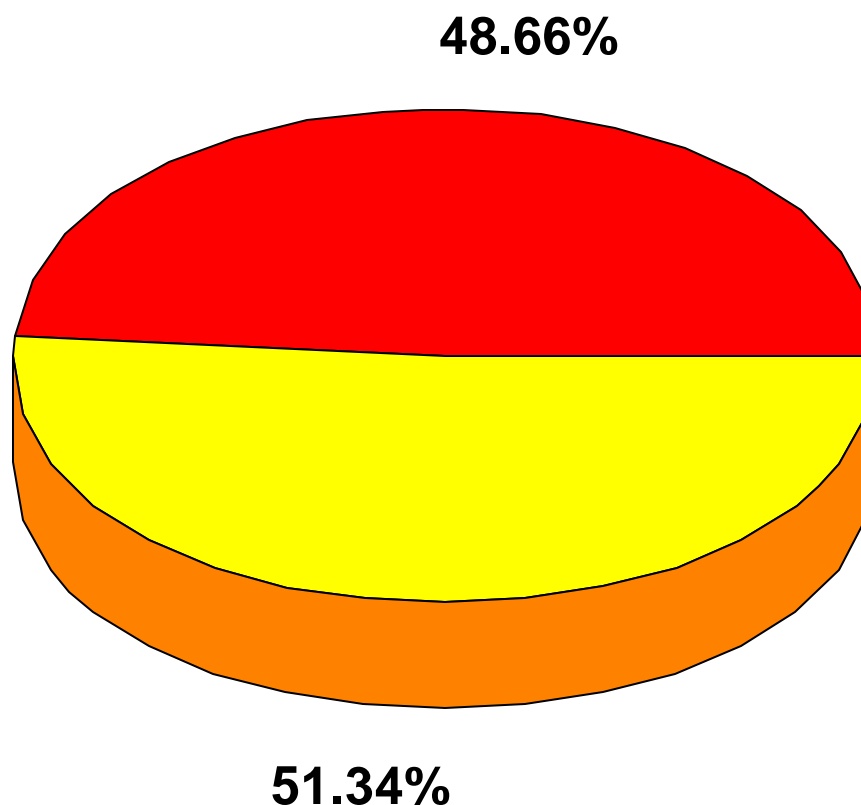
Monthly Imports of Tree Nuts



Note: Average Monthly Imports 1997-99

Source: US Census Bureau

Share of Tree Nut Imports in Relation to the U.S. Marketing Season



Marketing Season Peaks August 1-December 31

Based on Average Monthly Imports 1997-99

Source: US Census Bureau